

# *Move Activity Checklist*

Complements of:



*Office \* Biotech \* Industrial \* Machinery \* Electronics \* Storage*

(619) 564-6111

[www.cmtransfer.com](http://www.cmtransfer.com)

Relocating an entire company, large or small, can be a daunting task. There is quite a bit more to moving a company than simply calling a mover. There are many integral steps along the way towards a successful relocation.

The relocation process may seem simple, and it can be. However, there are a few important guidelines to follow and tips to remember when planning your company's relocation.

First of all, determine who is in charge of the move. Determine who will have the responsibility and authority to make sure all of the goals are met. The person that is selected must have the authority to make final decisions.

Second, start to plan for your move. The old adage says, "He who fails to plan, plans to fail." Next, notify your employees that the company will be moving. Sure, some people don't like change, but most of us do. Get them involved.

You'll be surprised at how much they will contribute. In addition, follow the move plan and concentrate on the details. Details are important or you wouldn't have included them in your plan. Furthermore, allocate sufficient time to get the tasks done. As you already know, things usually take longer than intended. Moreover, hope for the best, expect the worse and have a contingency plan for everything. It is smart to document your progress throughout the move. It is also smart to keep your company's management informed of each step of the move. This will assist in keeping your company's internal processes operating smoothly. Lastly, don't forget to relax and use your sense of humor...you will need it!

The following pages are a guideline for planning your company's relocation to its new facility. Of course, every move is different. But by following the rules of thumb listed above, you will be able to reduce the uncertainty and take control of the move project.

For your moving and storage needs, please call C & M Relocation Systems.

Good Luck!!

## **PACKING INSTRUCTION SHEETS**

**Desks/Returns/Credenzas:** Remove all contents from the drawers and surfaces of each piece and pack into a box. Place all small items such as pens and paper clips in an envelope and place in box. All liquids (ink, white out, etc.) can be put into a zip-lock bag and placed in a box. All large items (in & out baskets, desk pads, etc.) that will not fit into a box must have a label placed on them and left on top of the desk. These items will be moved on gondolas.

**File Cabinets:** Vertical file cabinets can remain full and will be moved with contents in place. They will require no packing unless they are being carried up or down the stairs. Lateral filing cabinets with more than three drawers will require packing of all but the bottom two drawers. All file cabinets should be locked whenever possible (if you have the key). Locks without keys should be taped to prevent them from being locked during the move. Put keys in an envelope and pack with the desk contents.

**Bookcases:** All bookcases must be emptied. The contents should be placed in the moving boxes or book-carts. If the bookcases have sliding doors, slide the doors to one side and secure it with tape. For those bookcases that have removable shelves, remove the shelves and place them together at the bottom of the bookcase. Remove the shelf clips, place them in an envelope and tape the envelope to the inside of the bookcase.

**Computer Equipment:** Unfasten, unbolt, unhook, unplug and tie up all loose cables, mouse, keyboard, etc. and place into a labeled large Ziploc computer bag. All components should be labeled separately and hard drives should be backed up including mission critical data to disc rather than to the network drive prior to being moved. C&M Relocation Systems personnel will load each piece of equipment onto our specially designed gondolas on move day.

**Boxes:** Our office moving cartons require no tape. Instructions for assembly are on each individual carton. Do not pack boxes above the top. Please a label on the side of the box in the area designated "LABEL HERE." Obtain boxes and labels from your company's assigned move leader for your area.

**Personal Items:** We cannot be responsible for your personal possessions, such as legal papers, money, lighters, fountain pens and sentimental items. For your own protection, we suggest that you move these items privately. If you need special containers, please ask your move consultant.

**Large Metal Supply Cabinets:** Remove the contents and drop the shelves to the bottom. Place a label on the top right hand corner of the cabinet.

**Pictures, Maps & Bulletin Boards:** Remove these items from the wall. Lean them against the wall and C&M Relocation Systems personnel will take it from there. Prior to the move, the mover should professionally pack all expensive artwork.

**Special Equipment:** Professional servicing may be required for your copiers or other data processing equipment. This service is available from the manufacture's service department. If you require furniture installers, electricians, plumbers, or machinery movers, please contact your C&M Relocation Systems move consultant prior to your move date.

**Plants:** Since the mover is not responsible for the safe transportation of plants, please arrange for other methods of transportation or have the mover handle at the company's risk. If your company has a plant service, your plant vendor may handle the movement of your plants.

An identification label with a corresponding number must be placed on every item that is to be moved. Our movers are instructed not to move any item unless labeled. The label is used in conjunction with a destination blueprint or office floor plan. This system is designed to facilitate the move. Our movers only need to follow them for a quick and efficient delivery of items without taking extra time to ask questions. Our supervisory personnel will be able to work directly with your company's move coordinator and staff to insure smooth business relocation.



THE CITY OF SAN DIEGO

Mick Mahaffey

C & M Relocation Systems  
1925 Gillespie Way, Suite B  
El Cajon, CA 92020

Subject: Thanks to C&M for a Highly Successful Move!

Dear Mr. Mahaffey:

Many thanks to you and to your very able staff for the expert planning and smooth completion of our highly successful move from Driscoll's Wharf to 2392 Kincaid Road. Everything happened according to plan. That was quite an accomplishment considering that there were thousands of items included in the move.

In particular, I want to compliment Jazz and Buddy for their demonstrations of exceptionally fine project management and excellent customer relations. It was a great pleasure to deal with these highly competent gentlemen during the fast-moving activities of getting us to our new home.

Sincerely,

A handwritten signature in black ink that reads "R. David Flesh".

R. David Flesh

Business Manager



MEMEC  
3721 Valley Center Drive  
San Diego CA 92130  
Tel: 858-314-8800  
Toll Free: 858-882-2444  
Fax: 858-314-8850  
Web: [www.memec.com](http://www.memec.com)

Mick Mahaffey

C & M Relocation Systems  
9323 Stevens Road  
San Diego, CA 92071

Dear Mick:

Now that the dust has settled, I wanted to let you know how pleased we were with the success of our corporate move at the end of March. C&M really came through for us, even with the tight timeframe and complexity of our move. Your on-site supervisors were professional and responsive, and the crews worked tirelessly during the seemingly endless hours. Everyone was pleasant to work with, and flexible about delays and lastminute alterations.

Although large corporate office moves are difficult at best, you and your staff helped to make ours as pleasant and smooth as possible. We really felt like you all were a part of our team. Thanks!

Sincerely,

  
Cheri Curtis

Facilities Manager



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6455 Lusk Blvd, San Diego, California 92121-2779 • (619) 587-1121 • Fax: (619) 452-9096

C and M Transfer San Diego  
Mick Mahaffey  
Cameron Herrick  
9323 Stevens Road  
Santee, CA 92071

Dear Mick & Cameron:

It is with great pleasure, due to positive working experiences, that I am recommending the moving services of C & M Transfer of San Diego, Inc. for any current or future relocation needs you may be considering.

C & M Transfer of San Diego, Inc. has been instrumental in the growth of Qualcomm through services provided over the last 5+ years. They have demonstrated a pattern of commitment to complete work at high standards and have both been excellent with their follow-up of completed tasks. In addition, the response from our employees is always favorable.

Our computer systems, and especially the large Sun systems require great care while moving. It is refreshing and comforting to work with a company which handles our machines with the same care and expertise as we would.

I recommend C & M Transfer of San Diego, Inc. for future consideration when dealing with the relocation of office assets, sensitive electronics and machinery.

I look forward to another year of excellent service by C & M Transfer of San Diego, Inc.

Sincerely,

A handwritten signature in black ink, appearing to read 'Rick Salazar', written in a cursive style.

Rick Salazar

## Move Activity Checklist

- Form a Move Committee.

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Assigned To	Due	Complete
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- Delegate and assign responsibilities to each member of the move committee. Use activity cards.

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Assigned To	Due	Complete
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- Find out if any licenses or permits are required at the new facility.

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Assigned To	Due	Complete
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- Determine if you will move over a weekend or after regular hours to avoid interruptions of business.

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Assigned To	Due	Complete
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- Make a detailed list of all floors and departments in the order they will be moved from the old facility. Decide which departments should be in operation at the destination first.

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Assigned To	Due	Complete
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- Select Department Move Coordinators

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Assigned To	Due	Complete
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- Develop a master relocation project schedule of goals.

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Assigned To	Due	Complete
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- Inventory all furniture, equipment and contents. Identify items such as paintings and sculpture that may need special handling.

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Assigned To	Due	Complete
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- Decide on which furniture and equipment to keep, which to sell and which to donate.

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Assigned To	Due	Complete
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- Check all computers, copiers, and other equipment for the proper preparation for moving. Verify if your mover will void any warranties or service contracts.

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Assigned To	Due	Complete
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- Determine if there is going to be any moving done before the main move, or if the move will *be* broken down into phases.

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Assigned To	Due	Complete
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- Check doorways, hallways, elevators, stairwells and loading docks at both locations for ease of egress and entry. Check the maximum weight that the elevator can lift.

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Assigned To	Due	Complete
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- Cover building policies and procedures for both facilities. See if there are any move-in restrictions.

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Assigned To	Due	Complete
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- Decide on security procedures for the move. Devise a method of confirming that all items removed from all locations arrived at the new facility. Consider providing identity badges to vendors, movers, and your employees.

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Assigned To	Due	Complete
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- Check for adequate parking at both locations and make arrangements, if necessary, with police or traffic divisions.

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- Schedule the refurbishing of existing furniture and equipment. Allow enough time for the refurbishment and its delivery to the new location.

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Assigned To	Due	Complete
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- Decide who is to do the packing: your employees, C & M Relocation Systems or what combination. Be specific on who, what, when and how people are to handle the contents of desks, pictures, computers, etc.

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Assigned To	Due	Complete
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- Develop an action plan for the move to minimize company downtime and business disruption.

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Assigned To	Due	Complete
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- Plan for gifts or cash payments, as necessary, to appropriate people, for expediting difficult tasks.

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Assigned To	Due	Complete
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Explain the move to key executives.

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Assigned To	Due	Complete
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Collect and analyze the movers' estimates

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Assigned To	Due	Complete
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Select an appropriate mover.

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Assigned To	Due	Complete
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Check the insurance costs from moving company

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Assigned To	Due	Complete
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Check the adequacy of your existing insurance coverage for the move. Review your policies and make sure all of your business equipment and furniture are covered before, during, and after the move. Update policies if necessary.

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Assigned To	Due	Complete
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Get Certificates of Insurance from the mover's insurance company.

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Assigned To	Due	Complete
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Arrange for the telephone lines at the new location, if necessary

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Assigned To	Due	Complete
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Get estimates for a telephone system and its installation at the new facility.

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Assigned To	Due	Complete
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Select a telephone company for new facility.

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Assigned To	Due	Complete
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Acquire telephone number(s) for the new facility. This should be done as early as possible.

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Assigned To	Due	Complete
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Make sure the telephone company will install a recording on your old phone number that gives your new number. Ask that the recording be in place for at least six months.

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Assigned To	Due	Complete
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Order Telephone equipment.

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Assigned To	Due	Complete
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Schedule with telephone installers to be on "stand-by" to take care of any last minute changes/problems, so that communications can be in operation when the offices open for business.

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Assigned To	Due	Complete
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Purchase new office furniture, if necessary.

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Assigned To	Due	Complete
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Plan to sell and/or purge out of date furniture and equipment

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Assigned To	Due	Complete
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File change of address forms with the post office for every person who receives mail at the office. The post office will forward your mail for one year.

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Assigned To	Due	Complete
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Notify banks, customers, insurance, IRS, services, software, vendors, subscriptions, etc. of new address and phone number.

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Assigned To	Due	Complete
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Give notice to vendors of your new address and when their products will be accepted and received at the new facility.

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Assigned To	Due	Complete
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Arrange to be listed on lobby directory of new facility. Allow 6 to 8 weeks.

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Assigned To	Due	Complete
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Schedule public relations effort, including plans for news releases, articles, office warming party, etc.

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Assigned To	Due	Complete
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Develop a cost effective way to make the transition from the old stationery and forms to the new, without running out of the old, but also without having to throw much away.

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Assigned To	Due	Complete
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- Place an order for new stationery using the new address, subject to confirmation of the new telephone number.

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Assigned To	Due	Complete
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- Confirm that new stationery is printed when new information is absolutely certain.

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Assigned To	Due	Complete
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- Purge existing files and storerooms before the move. Send files to off-site storage.

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Assigned To	Due	Complete
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- Explain the move schedule to all employees in meetings and memos. Delegate and clarify all tasks and assignments.

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Assigned To	Due	Complete
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- Arrange for each department to have a floor plan of their area within the new facility.

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Assigned To	Due	Complete
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- Arrange a tour of the new facility for department move coordinators.

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Assigned To	Due	Complete
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- Arrange a tour of the new facility for key executives and department heads.

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Assigned To	Due	Complete
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- Schedule training for security, fire and life safety procedures at the new location.

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Assigned To	Due	Complete
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- Schedule dates for the disassembly and reassembly of any equipment that needs to be moved before the actual move. This includes anything that requires more than the normal moving time for disassembly or reassembly.

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Assigned To	Due	Complete
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- Arrange for the plant service to remove and establish plants at the new location.

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Assigned To	Due	Complete
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- C & M Relocation Systems will deliver all boxes and materials.

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Assigned To	Due	Complete
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- Schedule the distribution of packing materials and schedule the packing dates and completion times.

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Assigned To	Due	Complete
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- Arrange for artwork, chalkboards, whiteboards, etc. to be taken off the walls at your facility. Arrange for their installation at the new location. C & M Relocation Systems can remove and install these items.

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Assigned To	Due	Complete
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- Confirm that telephones at the new location will be operating properly on or before your scheduled move-in day.

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Assigned To	Due	Complete
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- Arrange to relocate your present security system to the new location, or confirm the installation of the new system at the new location.

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Assigned To	Due	Complete
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- Explain to your employees exactly what he or she will be required to do. I.e., pack their offices, label all assets in their offices, etc.

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Assigned To	Due	Complete
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- Label all furniture and equipment, on a color-coded floor plan/blue print location.

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Assigned To	Due	Complete
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- All keys to furniture should be tagged, labeled and stored in a safe place.

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Assigned To	Due	Complete
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- IMPORTANT! Label every item that is going to be moved.

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Assigned To	Due	Complete
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- Schedule elevator service at both locations.

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Assigned To	Due	Complete
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- Arrange with the building manager to have the air conditioning operating during the move at both facilities.

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Assigned To	Due	Complete
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- Establish communications between old and new locations. This will keep open the lines of communication.

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Assigned To	Due	Complete
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- Schedule the delivery and installation of any new furniture and office equipment.

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Assigned To	Due	Complete
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- Notify all employees of what to do and when and where to report to their new workstations when the office opens for business.

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Assigned To	Due	Complete
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- Install locks at the new location and make duplicate keys. Distribute keys to appropriate employees.

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Assigned To	Due	Complete
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- Distribute parking passes and security cards for the new location. Maintain proper records for control and audit procedures.

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Assigned To	Due	Complete
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- Develop a "punch-list" of items to be completed by the contractors or suppliers.

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Assigned To	Due	Complete
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- Confirm that the Certificate of Occupancy and any other required permits or licenses have been obtained.

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Assigned To	Due	Complete
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- Reconfirm that the telephones at the new location will be operating properly on or before move day.

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Assigned To	Due	Complete
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- Arrange to feed your employees, if appropriate, during the move.

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Assigned To	Due	Complete
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- Develop a contingency plan for computer failure during and after the move.

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Assigned To	Due	Complete
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- Back up your computer systems before you move.

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Assigned To	Due	Complete
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- Protect elevator cabs, lobbies, walls and floor against damage from moving. C & M Relocation Systems provides this service.

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Assigned To	Due	Complete
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- Make sure to have a company representative available at both locations to answer questions and give directions to the movers.

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Assigned To	Due	Complete
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- After the last moving van is loaded, but before it leaves, walk through the facility to search for anything left behind. Look in elevator lobbies, hallways, offices, etc. A representative of C & M Relocation Systems will accompany you.

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Assigned To	Due	Complete
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- Place directional signs, room & area labels, and furniture plans within your new location.

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Assigned To	Due	Complete
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- A "Lost and Found" area should be set up to locate boxes, furniture, etc. that may have had their labels come off.

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Assigned To	Due	Complete
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- Schedule in company personnel for unpacking and re-stocking supply cabinets, storerooms, file rooms and removing labels from all furniture and equipment.

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Assigned To	Due	Complete
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- Schedule employees to arrange their desks and organize their work areas. Remove tags and labels from furniture, etc.

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Assigned To	Due	Complete
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- Arrange for a cleaning crew after the move has been completed. All boxes, cartons and moving materials should be removed as soon as possible.

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Assigned To	Due	Complete
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- Note any damages on the bill of lading. This is necessary to process any claim(s).

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Assigned To	Due	Complete
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- Develop a new phone list and map showing location of all departments on each person's work station when the office opens for business.

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Assigned To	Due	Complete
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- Transfer your insurance to the new location. Get Certificates of Insurance from your insurance company immediately.

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Assigned To	Due	Complete
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- Confirm that when you call your old telephone number, a recorded message correctly gives out your new telephone number.

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Assigned To	Due	Complete
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- Reconfirm the termination of the old lease and collect any security deposits.

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Assigned To	Due	Complete
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- Confirm the completion, delivery and installation of all items on both the construction and vendor punch list.

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Assigned To	Due	Complete
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- Collect parking passes, security cards and keys for the old location. Confirm the return of any deposits held by the property manager for these items.

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Assigned To	Due	Complete
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- Arrange for the maintenance of the new location. Establish housekeeping rules to prevent unwanted personal decorating.

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Assigned To	Due	Complete
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- Complete and file all warranty information for all new furniture and equipment.

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Assigned To	Due	Complete
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- Update fixed asset accounting system for any new furniture and equipment purchased. Don't forget to delete any old furniture and equipment sold or given to charity.

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Assigned To	Due	Complete
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- Confirm that changes of address corrections have been made.

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Assigned To	Due	Complete
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- Hold an office warming party after things have calmed down.

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Assigned To	Due	Complete
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**Additional Items**

Other: \_\_\_\_\_

Assigned To \_\_\_\_\_ Due \_\_\_\_\_ Complete \_\_\_\_\_

Other: \_\_\_\_\_

Assigned To \_\_\_\_\_ Due \_\_\_\_\_ Complete \_\_\_\_\_

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Assigned To \_\_\_\_\_ Due \_\_\_\_\_ Complete \_\_\_\_\_

## **Rx3 Pharmaceuticals, Inc.**

6310 Nancy Ridge Drive, Suite 105  
San Diego, CA 92121

Dear Mick,

I have to thank you and the team that moved Rx3 last week. The team was awesome! Everything has moved in fine fashion and I could not detect a single damaged item. The supervisor of the team, Jazz, was probably the best moving supervisor that I have worked with in a corporate move! He kept things moving at a good pace and interacted well with me asking questions when there was doubt about what items were moving where or what a label meant. I also need to highlight that this great job was done under unusual and difficult circumstances. On the day that we were moving, a second company also scheduled a move right on top of us. Thus, the building was filled with not only your team but with a team from Cor o-van. It was Quite apparent that the C&M team was by far the more professional and capable team.

I and all of the Rx3 team appreciate the Work of C&M in making our move happen. We will definitely use your company in the future and will gladly refer corporate moves to you.

Sincerely,



John Finn  
President



C&M Relocation Systems  
Mick Mahaffey  
1925 Gillespie Way  
El Cajon, CA 92020

Dear Mick:

This letter is intended to recognize the work that C&M Relocation Systems has put towards the successful relocation of the San Diego Padres into PETCO Park.

Our move was complicated in that we had to move out of several locations simultaneously. Because of the planning put into the project, the move PETCO Park was seamless. The crews were on-time, the packers were efficient and the movers and supervisors were a true pleasure to work with.

C&M has a great leader in Jazz. I found him to be organized and responsive to our needs throughout the project. I noticed he had a comfortable rapport with those he supervised and our staff enjoyed working with him.

The San Diego Padres Baseball Club highly recommends C&M Relocation Systems to anyone planning a relocation. If you should have any questions, please do not hesitate to call me.

Sincerely,

A handwritten signature in black ink, appearing to be "K. Haley".

Kevin M. Haley  
Director of Ballpark Development 619-699-5603



# ARROWHEAD

Group of Companies

At the beginning of each year I try to evaluate/review all the vendors I deal with. I'll review mainly service, product, and pricing. This does a few things for a company like Arrowhead. It saves us money, it ensures we are provided with the best service and/or product, and it establishes long term working relationships. Occasionally these letters to managers are followed by numerous meetings to: re-establish communications, receiving competitive pricing, and outstanding service.

I can assure you after this letter we will not be meeting for hours...

I believe C&M Transfers and the Arrowhead Group have been working together for roughly 6 years. The service we've received in the past has been outstanding. Craig Apelman has been a large contributing factor in why I've continued to trust C&M with our logistics needs.

I honestly hate large moves (no offense). There's always something that goes awry (not with C&M or the detailed moving plan I've put together). It's with the unknown i.e. elevator issues, loading dock issues, security guards, traffic, and many others. I never have to worry when Craig is in charge of my moves. When there's an issue he takes care of it. Our last problem was with a security guard. He stated we did not reserve the dock area (I did not have the patience to deal with), but Craig stepped-up to the plate and dealt with him diplomatically. I still don't know how he got the security guard to let us back the trucks in to the dock. Craig and crew got the job done that night. When I have a large move planned I like to make sure Craig is going to be in my corner, it places my mind at ease.

C&M has been very good to Arrowhead in providing other great services like storage needs, systems furniture service and storage, and we're considering record storage.

Out of the 45 various vendors I deal with, C&M is one of the most enjoyable and reliable companies.

Thanks for your time,



Angelo Ecija – Arrowhead Group Facilities  
619.744.0644

# MALCOLM DRILLING CO., INC.

16885 W. Bernardo Dr., Ste. 100, San Diego, CA 92127

(858) 753-0720 FAX: (858) 753-0707

Contractors License # 259543 - Expiration 7/31/06

C & M Relocation Systems

1925 Gillespie Way El Cajon, CA 92020

Dear Mick and Cheryl,

I wanted to take a moment to thank you and your staff for truly coming through on your promise to make our company's move quick and painless! From our first point of contact until our boxes were picked up yesterday, we have received nothing less than extraordinary customer service from C&M. We found your moving personnel to be courteous, professional and very careful with our belongings. Nothing was damaged, misplaced or forgotten and Craig, your crew Supervisor kept our moving day running seamlessly.

I have already recommended that the new Owner of our former location hire your company for their moving needs and I would happily recommend your services to others.

It has been a pleasure to work with you and should future needs require your business, I will surely contact you again.

Warm Regards,

MALCOLM DRILLING COMPANY, INC.

A handwritten signature in black ink that reads "Kelly Beckwith". The signature is written in a cursive, flowing style.

Kelly Beckwith Office Manager